



COMMONWEALTH of VIRGINIA

Department for the Aging

Jay W. DeBoer, J.D., Commissioner

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Note: The web addresses (links) in this document may change over time. The Department for the Aging does not attempt to refresh the links once the week has passed. However, this document is maintained on the web for a period of time as a reference. Some links may require registration.

1610 Forest Avenue, Suite 100, Richmond, Virginia 23229

Toll-Free: 1-800-552-3402 (Voice/TTY) • Phone: 804-662-9333 • Fax: 804-662-9354

E-mail: aging@vda.virginia.gov • Web Site: www.vda.virginia.gov

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Directors,
Area Agencies on Aging

FROM: Bill Peterson,
Deputy Commissioner for Programs

DATE: December 6, 2005

SUBJECT: Governor Announces Increase in State Heating Assistance

On November 30th, Governor Warner held a press conference to announce that he is adding an additional \$18 million in state General Funds, plus \$3 million in contributions from state utilities, to the federal funds that Virginia will receive under the Low-Income Home Energy Assistance Program (LIHEAP). If you have not already seen this announcement, you can go to the following link:

http://www.governor.virginia.gov/press_policy/releases/2005/nov05/1130.htm

COMMONWEALTH of VIRGINIA
Department for the Aging
Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors
Area Agencies on Aging

AND: Nutrition Directors

FROM: Elaine S. Smith, MS, RD
Program Coordinator

DATE: December 6, 2005

SUBJECT: National Institute on Aging (NIA) Publications for Health Promotion/Disease Prevention and Nutrition Education

The National Institute of Aging (NIA), part of the National Institutes of Health, has a portfolio of free publications chock full of information and resources geared specifically for older people.

Several booklets are available, for example, hot-off-the-presses and newly revised is *Talking with Your Doctor: A Guide for Older People*. This booklet gives readers a wide variety of helpful hints and timely tips that can be used at each doctor visit.

Also, NIA's popular *Age Pages* are a very helpful resource and there are now over 40 topics in this series. Each *Age Page* contains an overview of a specific topic area and offers readers a list of resources for more detailed information. Topic areas include health promotion/disease prevention, various diseases and conditions, senior safety, medical care, and planning for later years. A few titles appropriate for this time of year include Hypothermia: A Cold Weather Hazard, Shots for Safety, and Shingles.

Many of the *Age Pages* are offered in Spanish, and bulk copies are also available. They could be distributed to home delivered meals clients or kept on hand at health fairs and in senior centers for participants to pick up. *Age Pages* are also a great resource that could be used for presentation and discussion with seniors at congregate nutrition sites.

National Institute on Aging (NIA) Publications for Health Promotion/Disease Prevention
and Nutrition Education

December 6, 2005

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The free NIA materials can be ordered in several ways. Call the toll-free information line at (1-800-222-2225) or visit the website at www.niapublications.org where you can order online or print a form to order by mail or fax. You can also download and print many of the materials yourself as well as sign up for regular e-mail alerts.

I hope you find this information useful for your nutrition education and health promotion and disease prevention efforts. Please feel free to contact me with questions or comments at (804) 662-9319 or Elaine.Smith@vda.virginia.gov



COMMONWEALTH OF VIRGINIA

Department for the Aging
Jay W. DeBoer, J.D., Commissioner

December 6, 2005

MEMORANDUM

TO: All AAA Directors/Contractors

FROM: Raymond L. Williams, Jr.
External Financial Auditor

SUBJECT: **2005 Program & Financial Compliance Review Schedule**

Attached is the monitoring schedule for the current year. The areas to be reviewed during this process are still being finalized.

Hopefully the early distribution of the schedule will assist you with your planning needs. If there any questions concerning the schedule please contact me at 804 662-9347.

Attachment

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**Program & Financial Compliance Review
Monitoring Schedule FY05 Tracking Form
December 1, 2005 – November 30, 2006**

12/5/05 Rev11/29

December 2005

1. *December 7, 2005* (*Confirmed*)
Korean American Center (RW)
2. *December 14-15, 2005*
PSA 06 Valley Program For Aging Services (RW, ES)
3. *December 21-22, 2005*
PSA 09 Rappahannock-Rapidan Community Services Board (RW, ES)

January 2006

1. *January 12, 2004*
Norfolk Seniors Center (RW)

February 2006

1. *February 14-15, 2006*
PSA 11 Central Virginia Area Agency on Aging (RW, ES, EN)
2. *February 16, 2006*
South Central Area Education Center – Altavista (RW, EN)
3. *February 17, 2006*
Adult Care of Central Virginia (RW, EN)

March 2006

1. *March 9-10, 2006*
PSA 13 Lake Country Area Agency on Aging (RW, ES)
2. *March 15, 2006*
Commonwealth Catholic Charities (RW, JB)
3. *March 22, 2006*
Southside Senior Citizen, Inc. (RW)

April 2006

1. *April 4-5, 2006*
PSA 19 Crater Area Agency on Agency (RW, ES, FC, EN)

**Program & Financial Compliance Review
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12/5/05 **Rev11/29**

2. *April 10, 2006*
Personal Support Services (RW, JB)
3. *April 11-12, 2006*
PSA 8C Fairfax Area Agency on Aging (RW, EN, ES)
4. *April 13- 14, 2006*
PSA 8B Arlington Agency on Aging (RW, ES, EN)
5. *April 26-27, 2006*
PSA 8A Alexandria Agency on Aging (RW, ES, EN)
6. *April 28, 2006*
The City of Alexandria (Title V) (RW)

May 2006

1. *May 10-11, 2006*
PSA 8E Prince William Area Agency on Aging (RW, ES)
2. *May 22-23, 2006*
PSA 02 Appalachian Agency for Senior Citizens (RW, ES, FC, EN)
3. *May 24- 25, 2006*
PSA 01 Mountain Empire Older Citizens Inc. (RW, ES, EN)
4. *May 26, 2006*
Oxbow Corporation (St. Paul) (RW, EN)

June 2006

1. *June 13–14, 2006*
PSA 16 Rappahannock Area Agency on Aging (RW, ES)
2. *June 20-21, 2006*
PSA 14 Piedmont Senior Resources Area Aging (RW, ES, FC, EN)
3. *June 27, 2006*
Guardian of Life's Dreams (GOLD) Tazewell, Virginia (Guardianship) (RW, JB)
4. *June 28, 2006*
Southwest Virginia Legal Aid Society (RW, JB)
5. *June 29, 2006*
Family Services of Roanoke Valley (RW, JB)

**Program & Financial Compliance Review
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12/5/05 **Rev11/29**

6. *June 30, 2006*

Alleghany Highlands Community Services Clifton Forge (RW, EN)

July 2006

1. *July 6-7, 2006*

PSA 10 Jefferson Area Board for Aging (RW, ES, FC, EN)

2. *July 12-13, 2006*

PSA 17/18 Bay Aging (RW, ES)

3. *July 25-26, 2006*

PSA 15 Senior Connections / Capital Area Agency on Aging (RW, ES, FC)

August 2006

1. *August 1, 2006*

Chesapeake Department of Social Services (RW, JB)

2. *August 2, 2006*

Jewish Family Services (Guardianship) Virginia Beach Norfolk, Virginia (RW, JB)

3. *August 3-4, 2006*

PSA 21 Peninsula Area Agency on Aging (RW, ES, FC, EN)

4. *August 15-16, 2006*

PSA 03 District Three Senior Services (RW, ES, JB)

5. *August 17-18, 2006*

PSA 04 New River Valley Area Agency on Aging (RW, ES, FC, EN)

6. *August 28, 2006*

James Madison University Office of Sponsored Programs (RW)

7. *August 29, 2006*

Adult Care Center of The Northern Shenandoah Valley, Inc. (RW, EN)

8. *August 30, 2006*

Generations Crossing (RW, EN)

September 2006

1. *September 12, 2006*

SeniorNavigator.com (RW)

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2. September 20-21, 2006
PSA 8D Loudon County Area Agency on Aging (RW, ES, EN)
4. *September 25, 2006*
South Central Work Force Investment Board (Title V) (RW)
5. *September 26-27, 2006*
PSA 12 Southern Area Agency on Aging (RW, ES)

October 2006

1. *October 12, 2006*
Greater Richmond Chapter of the Alzheimer's Association (RW)
2. *October 13, 2006*
Catholic Charities of Hampton Roads (Guardianship) Virginia Beach Norfolk, Virginia (RW, JB)
3. *October 17-18, 2006*
PSA 05 LOA-Area Agency on Aging, Inc. (RW, ES, EN)
4. *October 24-25, 2006*
PSA 22 Eastern Shore Area Agency on Aging (RW)
5. *October 26-27, 2006*
PSA 20 Senior Services of Southeastern Virginia (RW)

November 2006

1. *November 1, 2006*
Virginia Association of Area Agencies on Aging (RW)
2. *November 2, 2006*
Thomas Jefferson Planning District Commission (RW)
3. *November 15, 2006*
Bridges-Senior Solutions, Inc. (RW; JB)
4. *November , 2006*
PSA 07 Shenandoah Area Agency on Aging (RW, ES, EN, FC)
5. *November , 2006*
Woodrow Wilson (RW, JHS)

COMMONWEALTH of VIRGINIA
Department for the Aging
 Jay W. DeBoer, J.D., Commissioner

MEMORANDUM

TO: Executive Directors - Area Agencies on Aging
 Area Agencies on Aging Information & Referral/Assistance
 Program Managers & Staff

FROM: Faye D. Cates, MSSW, Human Services Program Coordinator

DATE: December 6, 2005

**SUBJECT: REVISIONS TO THE INFORMATION & REFERRAL/ASSISTANCE
 SERVICE STANDARD**

There have been minor revisions to the Information & Referral/Assistance Service Standard, for clarification and consistency purposes. Attached is the revised service standard, which was revised 11/21/05 and is now on the VDA web site. The revisions are as follows:

1. All of the slashes (/) between Information & Referral/Assistance are now forward slashes.
2. Page 1, **Definition**, second sentence from last in the paragraph reads...In addition, information and assistance services...
 The revised text is ... *In addition, information and referral/assistance services...*
3. Page 1, **Service Delivery Elements**, the fifth item listed is Referral.
 The revised text is ... Referral /Assistance... to emphasis the “assistance” element of the process.

At the end of the paragraph is the revised text, ...*See “Client Records” for the required documentation.* Since there are various forms of documentation depending on the nature of the call and/or referral, this statement directs the reader to where in the service standard those requirements can be found.

4. Page 4, **Client Records**, the first bullet reads...
 - Virginia Service – Quick Form for information and referral cases. The revised text is ...
 - *Virginia Service – Quick Form for information **purposes only**...*
 This further clarifies that the Quick Form is utilized when short-term intervention in the form of information or resource sharing is provided.

I can be reached at (804) 662-9310 if there are questions.

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INFORMATION AND REFERRAL/ASSISTANCE
VIRGINIA DEPARTMENT FOR THE AGING
SERVICE STANDARD

Definition

Information and Referral/Assistance service is a service designed to support older persons and their caregivers in assessing their needs, identifying the most appropriate services to meet their needs and linking the older person and caregivers to the agencies providing needed services. The objectives of information and referral/assistance are to enable older persons to locate and use services and resources, which promote their well-being, independence, and self-determination, and to protect their interests and rights. It is an integral component for the development and implementation of service plans for case management services. In addition, information and referral/assistance services will collect and make available data to support community needs assessment and community planning activities. Outreach activity can be coordinated under this service definition.

Eligible Population

Individuals are eligible for Information and Referral/Assistance service if they are 60 years of age or older. Priority shall be given to older individuals who are in the greatest economic and social need, with preference given to low-income minority individuals and to those older persons residing in rural or geographically isolated areas.¹ Families and caregivers of elderly persons may also receive information and referral/assistance for needed services.

Service Delivery Elements²

Agencies providing Information and Referral/Assistance service must perform all of the following components:

Resource File: The development and maintenance of accurate, up-to-date, and well-organized information on opportunities, services, and resources available in the community, include detailed data on service providers.

Information: The process of informing an older person of available opportunities, services, and resources.

Electronic Media: The process of receiving and soliciting information via the Internet and e-mail.

Assessment: The process of identifying, analyzing, and prioritizing the needs of older persons, utilizing the Uniform Assessment Instrument Part A and other client assessment documents. Federal Poverty/VDA Sliding Fee Scale is required, unless all information needed to determine federal poverty is documented on the UAI. Cost sharing does not apply to this service.

Referral/Assistance: The process of initiating an arrangement between the older person or caregiver and the service provider; advising older persons and their caregivers; providing information to older persons to link them with the opportunities, services, and resources available to meet their needs; assisting

¹ Older Americans Act of 1965, as amended, Section 306(a)(4)(A)(i)

² *Implementation Guide for Older American Information and Referral Services*, NASUA, September 1993.

the person or caregiver to contact the appropriate community resource; and if necessary, advocating with agencies on behalf of older persons. See “Client Records” for the required documentation.

Outreach: The process of identifying older persons who may be in need of service. Strategies for outreach include, but are not limited to:

- Direct Mail - Offers a low cost, high contact rate and distribution of information with personalized content. It can be very selective about who is receiving the outreach message.
- Telephone Contact - Offers a low cost personalized way of contacting older persons. It allows immediate feedback and home visits may be determined as necessary.

Follow-Up: A process of contacting individuals and the organizations to which they were referred to determine the outcome of the referral. Determining the quality and effectiveness of the referral and the service provided to the person referred. Additional assistance to the individual in locating or using needed services may be a part of the follow-up. Follow-up is required in 10% of the referrals to the program.³

Planning and Evaluation: The process of aggregating and analyzing information collected through the provision of the service; collecting and reporting data on unmet needs for other services; and evaluating the overall effectiveness of the Information and Referral/Assistance service.

Administrative Elements

Staff Qualifications:

- Knowledge: Information and Referral/Assistance service staff should have an awareness of the biological, psychological, and social aspects of aging; the impact of disabilities and illnesses on aging; interviewing principles; community resources; and public benefits eligibility requirements.
- Skills: Information and Referral/Assistance service staff should have skills in establishing and sustaining interpersonal relationships; problem-solving; and advocacy.
- Ability: Information and Referral/Assistance service staff should have the ability to: communicate with persons of different socio-economic backgrounds; conduct an effective interview; complete an assessment; arrange and negotiate service referrals; and work independently.

Job Descriptions:

For each paid and volunteer position funded by Title III of the Older Americans Act, an Area Agency on Aging shall maintain:

- A current and complete job description which shall cover the scope of duties and responsibilities of Information and Referral/Assistance service staff; and
- A current description of the minimum entry-level standards of each job.⁴

³ *Implementation Guide for Older American Information and Referral Services*, NASUA, September, 1993.

⁴ 22 VAC 5-20-250, Grants To Area Agencies On Aging, Department for the Aging Regulations, Virginia Administrative Code

Units of Service:

Units of service must be reported in AIM for each client receiving services. Services units can be reported by client on a daily basis, but not aggregated (summarized) more than beyond one calendar month.

- Contacts: count those contacts with the client and collateral contacts with agencies/caregivers related to establishing services.
- Persons served (unduplicated): the client/caregiver who is to receive a direct service(s) or who generates the Virginia Service - Quick Form.

Optional Group Units (Not Entered into AIM)

- Number of Web Hits
- Number of calls (**put tick marks here**)

Group Units - These activities cannot be entered into the AIM system.

Program Reports:

- Aging Monthly Report (AMR) to VDA by the twelfth (12th) of the following month. If the Area Agency on Aging provides this service, this report must be updated and submitted even if no expenditures or units of service occurred.
- AIM client level data transmitted to VDA by the last day of the following month.

Consumer Contributions/Program Income

The Area Agency on Aging shall formally adopt written policies and procedures, approved by the governing board, regarding the collection, disposition, and accounting for program income.⁵

- Cost Sharing/Fee for Service: An Area Agency on Aging is not permitted to implement cost sharing/fee for service for recipients of this service.⁶

And/or

- Voluntary Contributions: Voluntary contributions shall be allowed and may be solicited provided that the method of solicitation is non-coercive.⁷

Quality Assurance

Staff Training:

- Staff should receive orientation on agency policies and procedures, client rights, community characteristics and resources, and procedures for conducting the allowable activities under this service.
- Staff should receive a minimum of 10 hours of in-service training per year based on the need for professional growth and upgrading of knowledge, skills, and abilities.

Supervision/Case Review:

Consultation, supervision and case review shall be available to all staff providing the service.

⁵ 22 VAC 5-20-410, Grants To Area Agencies On Aging, Department for the Aging Regulations, Virginia Administrative Code

⁶ Older Americans Act of 1965, as amended, Section 315(a)

⁷ Older Americans Act of 1965, as amended, Section 315(b)

Program Evaluation:

The agency should conduct regular systematic analysis of the persons served and the impact of the service. Subcontractors shall be monitored annually.

Client Records:

Service providers must maintain specific program records that include:

- Virginia Service - Quick Form for information purposes only. Suggested guideline: Complete the form on cases requiring more than 3 calls to the caller and/or 3 collateral calls for the purpose of resource identification/facilitation. At a minimum, this form must be updated annually.
- Part "A" Uniform Assessment Instrument (pages 1-4) for information and referral/assistance cases requiring direct services such as a home visit for assessment of service needs or multiple collateral contacts to facilitate services.
- Federal Poverty should be determined and documented. The Federal Poverty/VDA form may be used.
- Progress notes or contact logs to document case activity.

It is the responsibility of the agency to develop a written policy on when to use the appropriate form.